



ADOBE® ECHOSIGN®

Admin Guide



Contents

- Welcome to EchoSign!..... 3
- Account Setup..... 4
 - External Archive..... 4
 - How to set it up..... 4
 - Branding your account..... 6
 - Upload your logo..... 6
 - Add email header and footer images..... 7
 - Company name and URL hostname..... 8
- Security Settings.....10
 - User Security.....10
 - Login Password Policy.....10
 - Transaction Security.....12
- Users and Groups16
 - Users.....16
 - How to Create a User.....16
 - How to Deactivate/Reactivate a user.....18
 - How to promote a user to admin.....23
 - Groups26
 - How to Create a Group.....26
 - How to Add Users to a Group.....27
 - Group Settings.....29
- Agreement Settings.....34
 - How users can attach or choose documents.....34
 - Attaching Documents.....34
 - Setting message templates.....35
 - Message Templates.....35
 - Setting default reminders.....36
 - Reminders.....37
 - Setting a default document expiration.....38
 - Document Expiration.....38
- Library Documents/Templates39
 - Library Templates.....39



Creating a Reusable Document.....	39
Creating a Reusable Form Field Layer	43
Changing Permissions.....	46
Reports.....	49
Creating a new report.....	49
Report Parameters.....	49
Report results.....	51



Welcome to EchoSign!

Before you begin using your EchoSign account, we've got some suggested steps to getting your account setup and customized for your company's use. The purpose of this guide is to get you up and running with branding, security settings, users and templates.

This guide is outlined in such a way that as you move through the "chapters", you'll cover all of the important features and settings. By the end, your account will be up and ready to go. Keep in mind, there are plenty of other options and settings to explore that aren't covered in this guide. Our knowledge base is an excellent resource for getting information on the other settings that can be found in EchoSign.

Now sit back, login and let's get you eSigning!



Account Setup

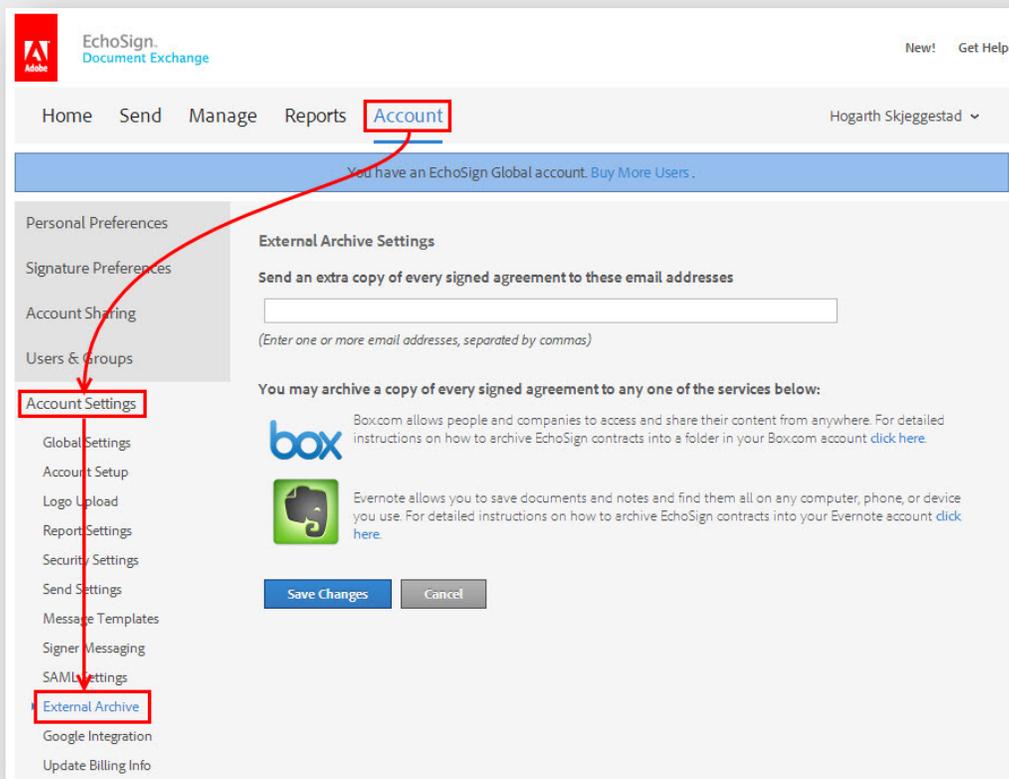
This section will go over the suggested steps for initially setting up your account.

External Archive

Like backing up your computer or phone, it's a good idea to keep copies of your signed agreements. Instead of downloading the agreements one by one from the Manage page, the External Archive can send a copy of signed agreements to an alternate email address, an Evernote account or a Box account.

How to set it up

As admin, go to the **Account** page and click on **External Archive** on the left hand side of the page.



To have copies of your account's agreements send to an alternate email address, enter that email address into the **Send an extra copy...** field and click the **Save Changes** button.





To have a copy sent to either Evernote or Box, click the corresponding **click here** link and specific instructions will pop-up in a new window.

 Box.com allows people and companies to access and share their content from anywhere. For detailed instructions on how to archive EchoSign contracts into a folder in your Box.com account [click here](#)

 Evernote allows you to save documents and notes and find them all on any computer, phone, or device you use. For detailed instructions on how to archive EchoSign contracts into your Evernote account [click here](#)



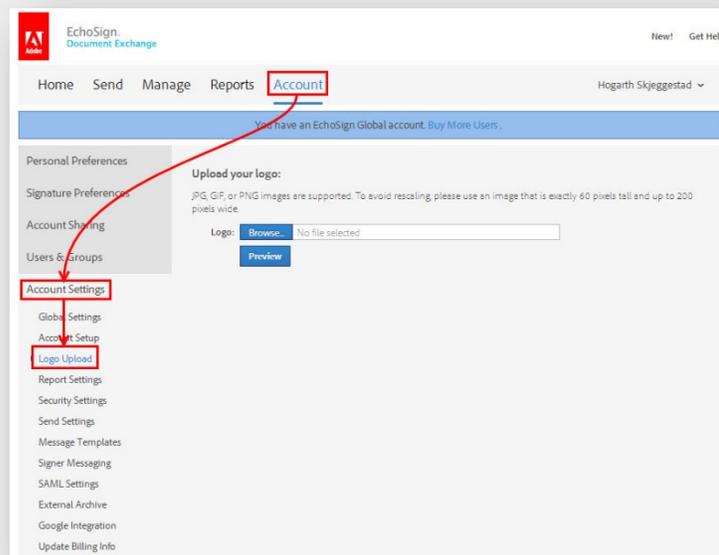
Branding your account

Upload your logo

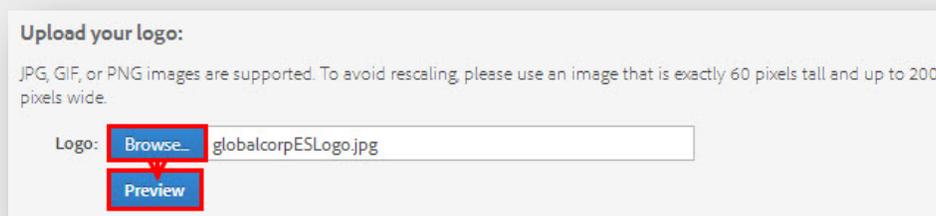
Adding your company logo is the basic way to customize EchoSign for the users in your account, and your signers.

Logos can be set per group, however this setting is not exposed through the admin settings. As admin, visit <https://www.echosign.adobe.com/en/support.html> and open a ticket including the image and name of the group and the Support team can set it for you.

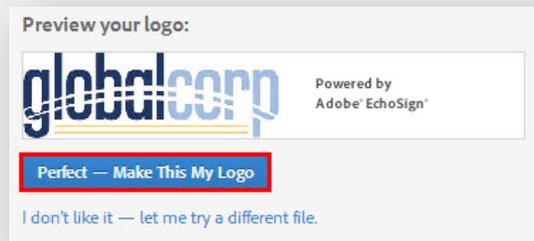
Go to the **Account** page and click on **Account Settings** then **Logo Upload**.



On the upload page, click the **Choose File** button and navigate to the image you want to use. Keep in mind, images of the stated dimensions (60 pixels tall and 200 pixels wide) work the best. Once you've chosen an image click the **Preview** button.



Your logo will be shown as it will appear to your users and signers. If you like how it looks, click the **Perfect** button.

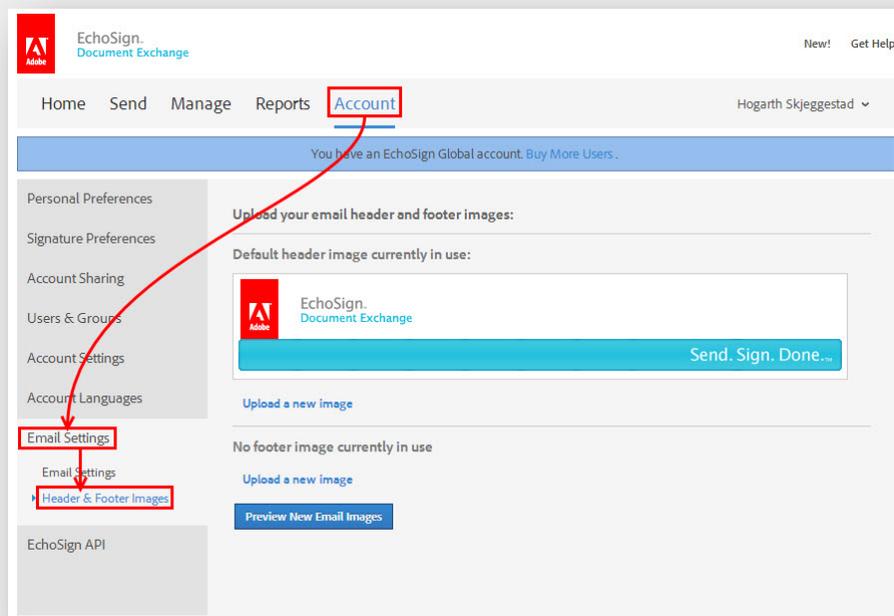


Add email header and footer images

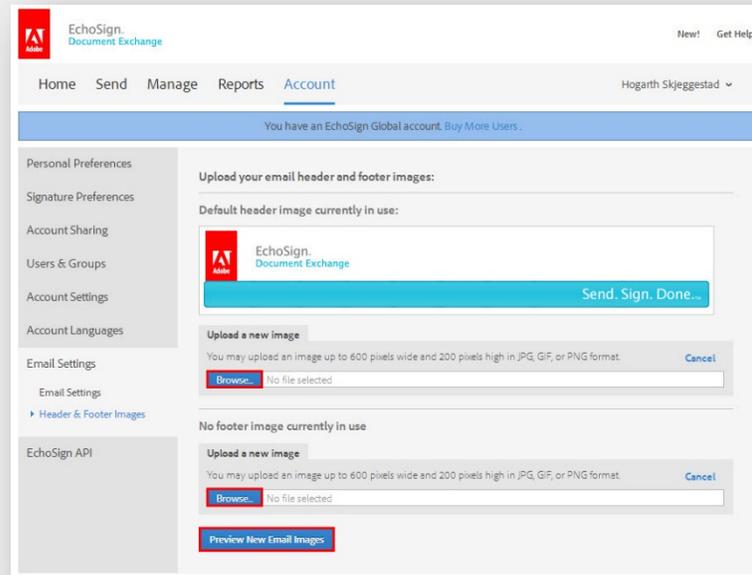
Uploading custom header and footer images provide an additional level of customization. The images can provide additional information about your company or just help identify who the agreement is from.

Email header and footer images can be set per group, however this setting is not exposed through the admin settings. As admin, visit <https://www.echosign.adobe.com/en/support.html> and open a ticket including the images and name of the group and the Support team can set it for you.

To add or change these, go to the **Account** page and click on **Email Settings** then **Header & Footer Images**. By default, the EchoSign header image is in place.



Click on **Upload a new image** for either the header and/or footer, and navigate to the image on your system. The suggested dimensions (600 pixels in width and 200 pixels in height) work best. Once you've chosen an image, click the **Preview New Email Images** button.



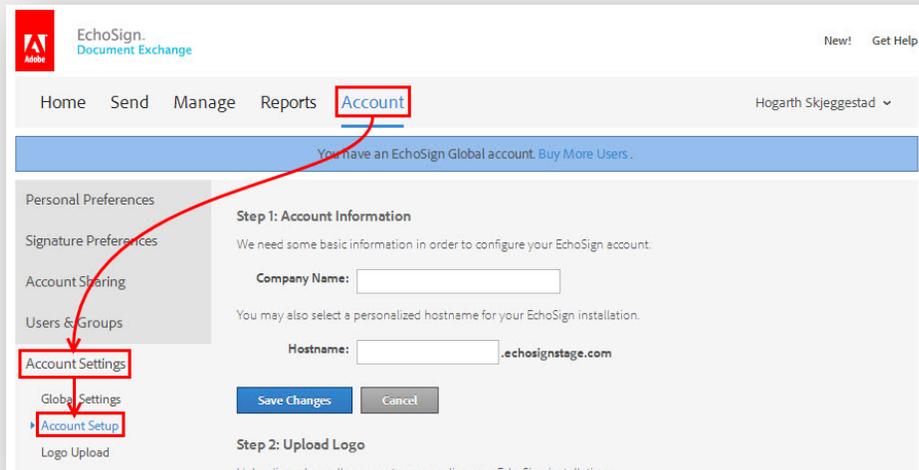
Your header and footer images will be shown as they will appear in email messages associated with your account. If you like how they look, click the **Perfect** button.



Company name and URL hostname

In this brief section you will set the company name for your account and a hostname. These may seem basic, but they will further you to personalize your account.

Go to the **Account** page and click on **Account Settings** then **Account Setup**.



The company name you enter into this field will be displayed in all email correspondence from EchoSign. This is also automatically populated into Company Name fields for your users when they need to sign a document.

Company Name:

Setting the hostname for your account changes the URL your users login to and the URL where agreements are hosted for your signers.

Hostname: .echosignstage.com

The result is a customized URL with your hostname.

<https://hogarthshelms.echosig.com/public/home>



Security Settings

Account, user and document security is EchoSign's number one concern. This is why we provide a number of security options at the account level. We suggest reviewing the settings in this section and decide which will work the best for your use case.

User Security

Account – Account Settings - Security Settings

If your company has a federated login solution, EchoSign does provide SAML 2 options for user authentication. For more information, contact your Account Manager or the Support team.

Login Password Policy

The options under **Login Password Policy** set whether users should be required to change their password after a number of months, whether a previous password can be used as their new password and how many login attempts can be made before their userID is locked.

Security Settings

Login Password Policy

- Require users to periodically change their passwords every months
- Ensure that users do not reuse their last passwords
- Allow users attempts to login before locking their accounts

Login Password Strength

This setting allows you to adjust the strength or difficulty of the password set by users in your account.

Login Password Strength

- Standard - At least 6 characters
- Medium - At least 7 characters, must include upper case or number
- Strong - At least 8 characters, must include lower case, upper case, and numbers

Single Sign-on Settings

You can either allow or deny users in your account to login using their credentials from other web services.



Single Sign-on Settings

Allow users in your account to sign into EchoSign using usernames and passwords from other web services.

- Adobe ID
- OpenID including Gmail, Google Accounts, Google Apps

Allowed IP Ranges

This option will allow you to block your users from logging in when the request is coming from the entered IP addresses.

Allowed IP Ranges

- Prevent users from logging in to the system from an IP address not listed below

Account Sharing

You can enable or disable user's ability to share their accounts. Since account shares can be accepted by anyone with an email address, this helps keep that user's agreements secure. If you would like sharing enabled, you can set who account shares can be initiated by.

Account Sharing

- Allow account sharing

Account sharing can be initiated by

- A user asking to view another user's account
- A user asking to allow another user to view their account
- Both

Signer Identity Verification

If your users will be signing documents, this option will require them to login before they can sign. This ensures the individual signing is either the user or someone with the user's credentials.

Signer Identity Verification

- Require signers in my account to log in to EchoSign before signing



Transaction Security

Account – Account Settings - Security Settings

PDF Encryption Type

This setting defines the type of encryption applied to the document once it has been sent through EchoSign. This encryption ensures the document can be opened but cannot be edited. Each version of the encryption is compatible with different versions of Acrobat. The default option (128-bit RC4) is chosen to ensure the signed document can be opened on most systems.

PDF Encryption Type

- 40-bit RC4 - Compatible with Acrobat 3.0 and later.
- 128-bit RC4 - Compatible with Acrobat 5.0 and later.
- 128-bit AES - Compatible with Acrobat 7.0 and later.
- 256-bit AES - Compatible with Acrobat X and later.

Agreement Signing Password

This option controls the "Verify signer identity – Signing password" option on the Send page. This limit dictates how many attempts the signer has to enter the correct password to access the document to sign. Once this limit is exceeded the agreement is canceled.

Agreement Signing Password

Apply a password policy when protecting document signing or viewing

Allow signer attempts to enter the agreement password before cancelling the agreement.

Agreement Signing Password Strength

This setting allows you to adjust the strength or difficulty of the password signers need to enter to access the agreement sent to them.

Agreement Signing Password Strength

- None - Any password is allowed
- Standard - At least 6 characters
- Medium - At least 7 characters, must include upper case or number
- Strong - At least 8 characters, must include lower case, upper case, and numbers



Knowledge Based Authentication

This option controls the "Verify signer identity – Knowledge based authentication" option on the Send page. This limit dictates how many attempts the signer has to pass the KBA to access the document to sign. Once the limit is exceeded the agreement is canceled. The difficulty of the KBA is also set here.

Knowledge Based Authentication

Allow signer attempts to validate their identity before cancelling the agreement.

Knowledge Based Authentication difficulty level

Default ?

Hard ?

Account – Account Settings – Send Settings

Signed Document Password Protection

This setting allows, forces or denies users the ability to set a signed document password on an agreement they send.

This layer of security requires a predetermined password to open the signed copy of an agreement. This password must be passed to the signer separate from the transaction and if this password is lost or forgotten, it cannot be recovered.

Signed Document Password Protection ?

Allow senders to password protect signed documents

Enforce senders to password protect signed documents

Do not allow

Signer Identity Verification Settings

Various methods of signer verification can be enabled for your users, with this setting. These methods will be on the Send page under the "Verify signer identity" option.

- **Signing password** – Requires the signer to enter a predetermined password to sign the document. The password must be passed to the signer separate from the transaction. If this password is lost or forgotten, it cannot be recovered.
- **Knowledge based authentication** – Requires the signer to enter their Social Security Number and random identity questions will be generated by a third party provider.
- **Web identity** – Requires signer to authenticate with one of the following services: Facebook, LinkedIn, Google, Twitter, Yahoo!, or Windows Live ID.



Send Options per Recipient

Allow senders to set signer identity verification options per recipient ?

Enabled Signer Identity Verification Methods

Signing password ?

Knowledge based authentication(up to 20 agreements per month) ?

Social identity ?

By default, use the following signer identity verification method

Choosing one of these methods will make it checked by default on the Send page. Only one of the options can be chosen.

By Default, Use the Following Signer Identity Verification Method:

Signing password

Knowledge based authentication

Social identity

Sender settings

When choosing a default signer identity verification method, this option either allows or denies users to change the method chosen.

Sender settings

Allow senders to set signer identity verification settings per document

Signer Identity Verification for Signers in My Account

Checking this setting allows users to set a different method of verification when sending agreements to signers that are in your account. The same methods for external signers are provided for signers in your account. A default method can be set, as well as the ability to allow or deny users to change this default method.



Signer Identity Verification for Signers in My Account

Allow using different Signer Identity Verification settings for signers in my account.

Enabled Signer Identity Verification Methods

- Signing password
- Knowledge based authentication (up to 20 agreements per month)
- Social identity

By Default, Use the Following Signer Identity Verification Method:

- Signing password
- Knowledge based authentication
- Social identity

Sender settings

- Allow senders to set signer identity verification settings per document



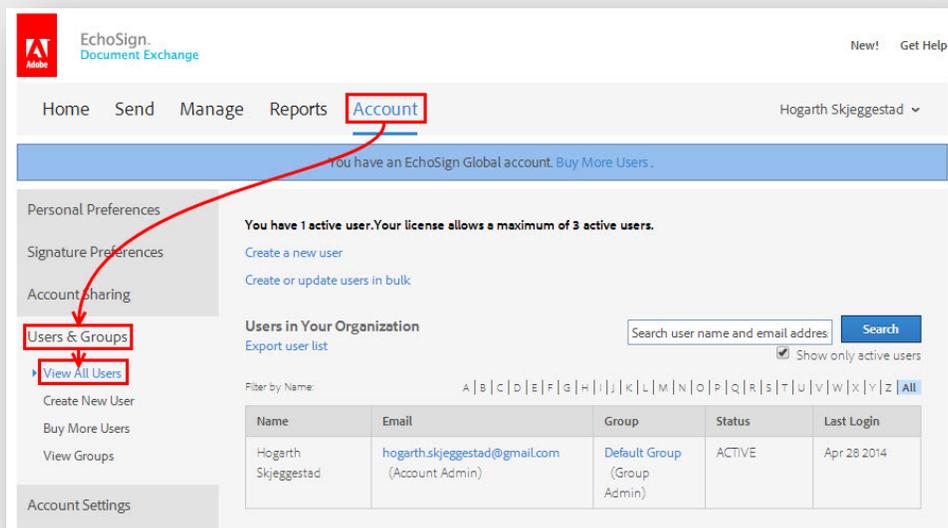
Users and Groups

Users

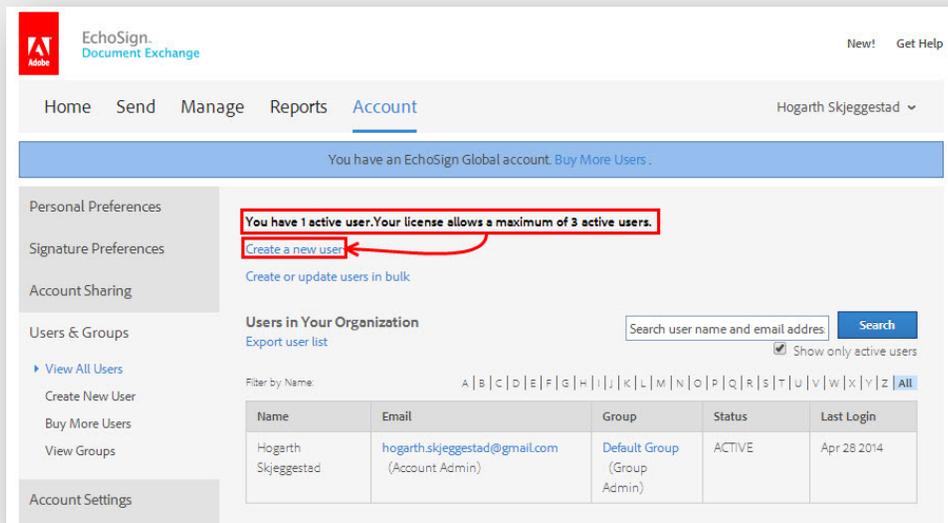
Users are generally added to an account because they will either be sending out agreements or be group or account level admins. Users that will be signing agreements do not need to be added, unless you want to control their ability to sign with account level settings.

How to Create a User

To get started you need to go to the **Account** page and click on **Users & Groups** then **View All Users**.



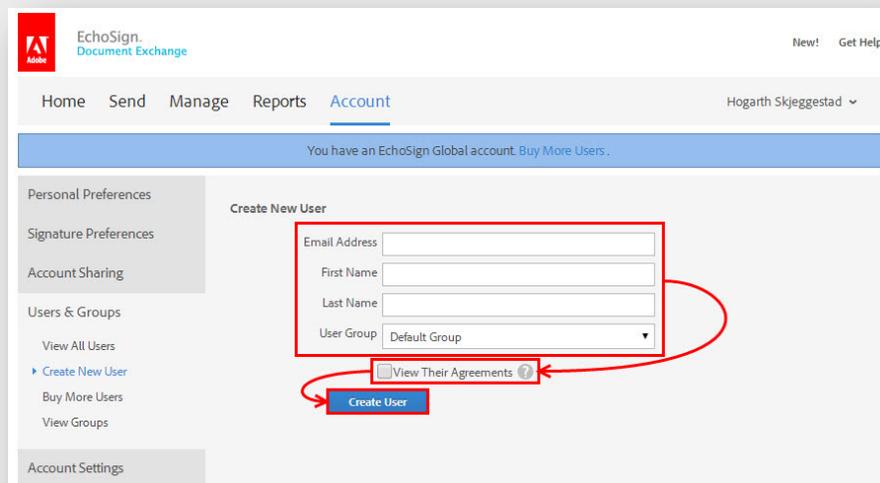
The number active users versus the number of licenses you have available will be displayed at the top of the page. To create a new user, click on the **Create a new user** link.



Enter the email address, first name and last name for the user you want to create. Make sure all of this information is correct, especially the email address. Once the user is created the email address cannot be changed until the email entered is verified. If there's an error in the email, it can't be verified.

Check the **View Their Agreements** option if you want to setup a share for this user to yours. This will give you visibility of all of this users agreements.

Once you're done and all of the information is correct, click the **Create User** button.



You will be taken back to the user list with a message stating the user was sent an email to set their password. The user you just created may not be in the default list presented. If you don't see the user, uncheck the **Show only active users** option. This will refresh the page and display users in statuses other than ACTIVE.



The screenshot shows the EchoSign Account page. The navigation bar includes Home, Send, Manage, Reports, and Account. A notification banner states: "You have an EchoSign Global account. Buy More Users." The left sidebar contains sections for Personal Preferences, Signature Preferences, Account Sharing, Users & Groups, and Account Settings. The main content area displays "You have 2 active users. Your license allows a maximum of 3 active users." and provides links to "Create a new user" and "Create or update users in bulk". Below this is a search bar for "Search user name and email address" with a "Search" button and a checked checkbox for "Show only active users". A "Filter by Name" dropdown is set to "All". A table lists the active users:

Name	Email	Group	Status	Last Login
Garth Skjeggstad	hogarth.skjeggstad+1@gmail.com	Default Group	ACTIVE	Mar 25 2014
Hogarth Skjeggstad	hogarth.skjeggstad@gmail.com (Account Admin)	Default Group (Group Admin)	ACTIVE	Apr 28 2014

Users can be in the following statuses:

PENDING – The user must register their account before logging in. They can register here: <https://secure.echosign.com/public/register>

CREATED – The user has been sent an email to set the password for their login. They need to set their password via the link in the email sent before they can login.

ACTIVE – The user is active and able to login, send and sign agreements. This user does consume a license.

INACTIVE – The users is unable to login, send or sign documents. This user does not consume a license.

How to Deactivate/Reactivate a user

Sometimes the need to deactivate a user may arise. The individual could have left the company and you want to keep that user and related documents secure. As mentioned above, making a user inactive keeps anyone from logging in, sending or signing documents with that userID. Even if someone has the login information.

Deactivating

From the account page, click on **Users & Groups** and **View All Users** then click on the email address of the user you want to deactivate.



EchoSign Document Exchange

Home Send Manage Reports **Account** Hogarth Skjeggstad

You have an EchoSign Global account. Buy More Users .

Personal Preferences
Signature Preferences
Account Sharing
Users & Groups
View All Users
Create New User
Buy More Users
View Groups
Account Settings
Account Languages

You have 2 active users. Your license allows a maximum of 3 active users.
Create a new user
Create or update users in bulk

Users in Your Organization
Export user list

Search user name and email address Search

Show only active users

Filter by Name: A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | All

Name	Email	Group	Status	Last Login
Garth Skjeggstad	hogarth.skjeggstad+1@gmail.com	Default Group	ACTIVE	Mar 25 2014
Hogarth Skjeggstad	hogarth.skjeggstad@gmail.com (Account Admin)	Default Group (Group Admin)	ACTIVE	Apr 28 2014

On the User Info page, click on the **Deactivate User** button.

EchoSign Document Exchange

Home Send Manage Reports **Account** Hogarth Skjeggstad

You have an EchoSign Global account. Buy More Users .

Personal Preferences
Signature Preferences
Account Sharing
Users & Groups
View All Users
Create New User
Buy More Users
View Groups
Account Settings
Account Languages
Email Settings
EchoSign API

User Info

Name: Garth Skjeggstad
Email: hogarth.skjeggstad+1@gmail.com
Job Title: Support
Company: EchoSign
Password: Valid [Reset Password](#)
Last Login: 03/25/14 10:08:29 AM
Status: ACTIVE **Deactivate User**

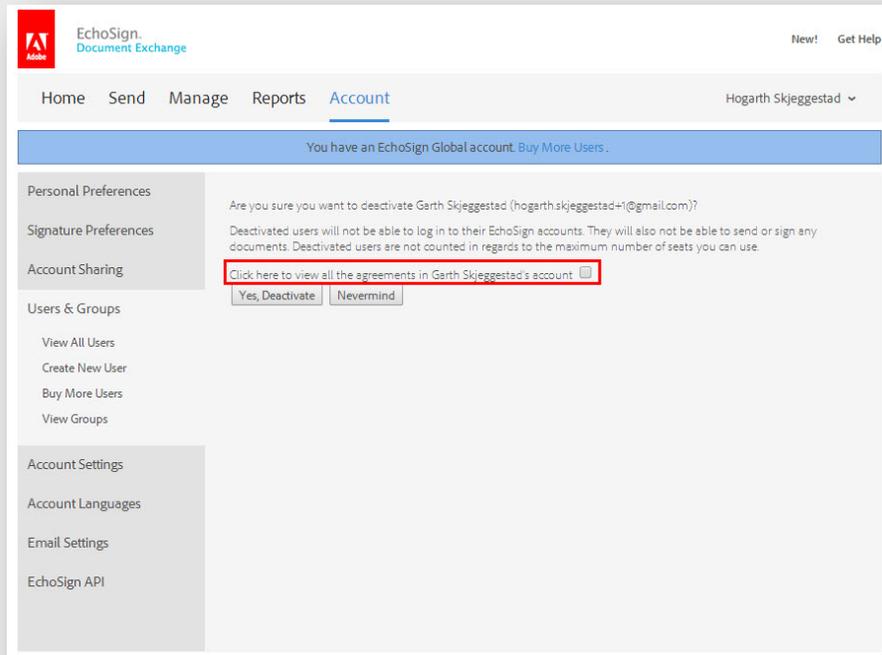
User Settings

User Group: Default Group

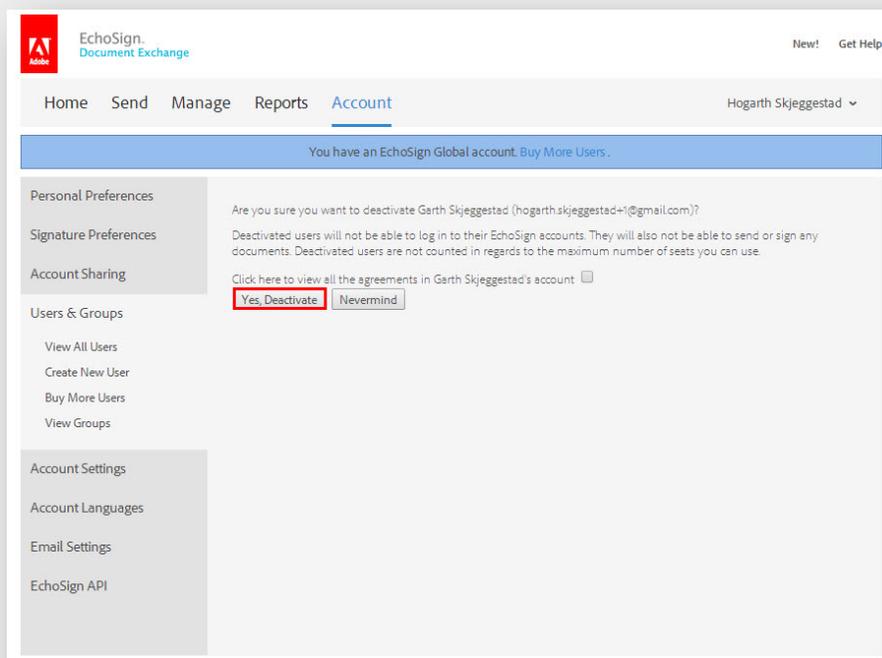
User is an account administrator
 User is a group administrator
 User can send documents
 User can sign documents

[Save Changes](#) [Reset](#)

This page doubles as a confirmation page and an opportunity to have the user's documents shared to you. Checking the option on the page will create a view only share when the user is deactivated. Their agreements will show in the various categories on your Manage page.



Once you've confirmed and decided to have the account shared or not, click the **Yes, Deactivate** button.



You will return to the User Info page and see that the user now has an INACTIVE status.



The screenshot shows the EchoSign Account page for user Hogarth Skjeggstad. The page has a navigation bar with 'Home', 'Send', 'Manage', 'Reports', and 'Account' (highlighted). Below the navigation bar, there are two status messages: a green one stating 'You have deactivated the account for Garth Skjeggstad. They will not be able to send or sign documents.' and a blue one stating 'You have an EchoSign Global account. Buy More Users.'.

The main content area is divided into a left sidebar and a main panel. The sidebar contains sections for 'Personal Preferences', 'Signature Preferences', 'Account Sharing', 'Users & Groups', 'Account Settings', 'Account Languages', 'Email Settings', and 'EchoSign API'. The 'Users & Groups' section is expanded, showing options: 'View All Users', 'Create New User', 'Buy More Users', and 'View Groups'.

The main panel displays 'User Info' for Garth Skjeggstad, including Name, Email (hogarth.skjeggstad+1@gmail.com), Job Title (Support), Company (EchoSign), and Last Login (03/25/14 10:08:29 AM). The Status is 'INACTIVE', with a 'Reactivate User' button next to it. Below this is the 'User Settings' section, which includes a 'User Group' dropdown set to 'Default Group' and four checkboxes: 'User is an account administrator', 'User is a group administrator', 'User can send documents' (checked), and 'User can sign documents'. 'Save Changes' and 'Reset' buttons are at the bottom.

Reactivating

From the Account page, click on **Users & Groups** and **View All Users**. This will get you to your user list, but by default, the list only shows active users. To view all users for the account, uncheck the **Show only active users** option and click on the email address of the user you want to reactivate.



Account

You have an EchoSign Global account. Buy More Users .

Personal Preferences
Signature Preferences
Account Sharing

Users & Groups
View All Users
Create New User
Buy More Users
View Groups

Account Settings
Account Languages
Email Settings
EchoSign API

You have 1 active user. Your license allows a maximum of 3 active users.
Create a new user
Create or update users in bulk

Users in Your Organization
Export user list

Search user name and email address Search
 Show only active users

Filter by Name: A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | All

Name	Email	Group	Status	Last Login
Garth Skjeggstad	hogarth.skjeggstad+1@gmail.com	Default Group	INACTIVE	Mar 25 2014
Garth Skjeggstad	hogarth.skjeggstad+2@gmail.com	Default Group	CREATED	
Hogarth Skjeggstad	hogarth.skjeggstad@gmail.com (Account Admin)	Default Group (Group Admin)	ACTIVE	Apr 28 2014
New User	hogarth.skjeggstad+new@gmail.com	Default Group	CREATED	

You will be taken to the User Info page. Click the **Reactivate User** button to... reactivate the user.

Account

You have an EchoSign Global account. Buy More Users .

Personal Preferences
Signature Preferences
Account Sharing

Users & Groups
View All Users
Create New User
Buy More Users
View Groups

Account Settings
Account Languages
Email Settings
EchoSign API

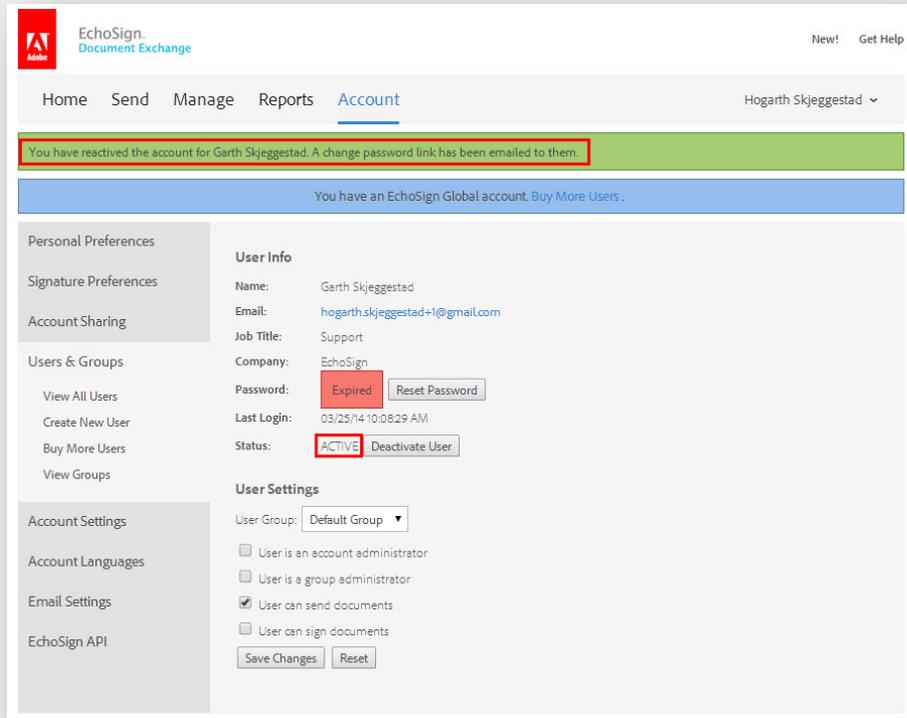
User Info
Name: Garth Skjeggstad
Email: hogarth.skjeggstad+1@gmail.com
Job Title: Support
Company: EchoSign
Last Login: 03/25/14 10:08:29 AM
Status: INACTIVE **Reactivate User**

User Settings
User Group: Default Group
 User is an account administrator (Only editable for active users)
 User is a group administrator (Only editable for active users)
 User can send documents (Only editable for active users)
 User can sign documents (Enable delegation in order to edit)
Save Changes Reset

The User Info page will refresh and you'll see the user now has an ACTIVE status.



When a user is initially deactivated their password is automatically expired for security purposes. Once they are reactivated the system will automatically send a password reset email.



How to promote a user to admin

Setting up an additional admin for your account is ideal. Not only does this create another user that has access to the various account settings, but if a problem arises and someone needs to contact support in your absence, this admin user will have rights to information standard users do not.

Start by going to the **Account** page and click on **Users & Groups** and **View All Users**. Then click on the email address of the user you want to promote.



Home Send Manage Reports **Account** Hogarth Skjeggstad

You have an EchoSign Global account. [Buy More Users](#).

Personal Preferences
Signature Preferences
Account Sharing
Users & Groups
View All Users
Create New User
Buy More Users
View Groups

Account Settings
Account Languages
Email Settings
EchoSign API

You have 2 active users. Your license allows a maximum of 3 active users.
[Create a new user](#)
[Create or update users in bulk](#)

Users in Your Organization
[Export user list](#)

Search user name and email address
 Show only active users

Filter by Name: A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | **All**

Name	Email	Group	Status	Last Login
Garth Skjeggstad	hogarth.skjeggstad+1@gmail.com	Default Group	ACTIVE	Mar 25 2014
Hogarth Skjeggstad	hogarth.skjeggstad@gmail.com (Account Admin)	Default Group (Group Admin)	ACTIVE	Apr 28 2014

Then check the options according to the type of admin you want to promote them to. You can promote them to group admin, account admin or both. Once you're done, click the **Save Changes** button.

Home Send Manage Reports **Account** Hogarth Skjeggstad

You have an EchoSign Global account. [Buy More Users](#).

Personal Preferences
Signature Preferences
Account Sharing
Users & Groups
View All Users
Create New User
Buy More Users
View Groups

Account Settings
Account Languages
Email Settings
EchoSign API

User Info
Name: Garth Skjeggstad
Email: hogarth.skjeggstad+1@gmail.com
Job Title: Support
Company: EchoSign
Password: Valid
Last Login: 03/25/14 10:08:29 AM
Status: ACTIVE

User Settings
User Group: Default Group

User is an account administrator
 User is a group administrator
 User can send documents
 User can sign documents

You can also set whether or not this user has the right to sign and send documents. This may be ideal for departments or teams that should not be signing documents.



See the section on Delegation for more information.

The screenshot shows the EchoSign Document Exchange user interface. At the top, there is a navigation bar with 'Home', 'Send', 'Manage', 'Reports', and 'Account' (which is highlighted). The user's name 'Hogarth Skjeggstad' is visible in the top right. Below the navigation bar, a blue banner states 'You have an EchoSign Global account. Buy More Users.' The main content area is divided into two columns. The left column contains a sidebar with various settings categories: Personal Preferences, Signature Preferences, Account Sharing, Users & Groups, Account Settings, Account Languages, Email Settings, and EchoSign API. The right column displays the 'User Info' and 'User Settings' for the current user. Under 'User Info', fields for Name, Email, Job Title, Company, Password, Last Login, and Status are shown. Under 'User Settings', there are four checkboxes: 'User is an account administrator', 'User is a group administrator', 'User can send documents', and 'User can sign documents'. The 'User can send documents' checkbox is checked and highlighted with a red rectangle. At the bottom of the settings section, there are 'Save Changes' and 'Reset' buttons.

User Info

Name: Garth Skjeggstad
Email: hogarth.skjeggstad+1@gmail.com
Job Title: Support
Company: EchoSign
Password: Valid [Reset Password](#)
Last Login: 03/25/14 10:08:29 AM
Status: ACTIVE [Deactivate User](#)

User Settings

User Group: [Default Group](#)

- User is an account administrator
- User is a group administrator
- User can send documents
- User can sign documents

[Save Changes](#) [Reset](#)



Groups

Groups allow you to set specific settings for the users inside that group. This means, for example, your sales team can use EchoSign differently than your accounting department.

How to Create a Group

First go to the **Account** page and click on **Users & Groups** and then **View Groups**.

The screenshot shows the EchoSign Account page. The 'Account' tab is selected in the top navigation bar. In the left sidebar, 'Users & Groups' is highlighted, and 'View Groups' is selected. A red arrow points from 'View Groups' to the 'Account' tab. The main content area shows a table of groups in the organization.

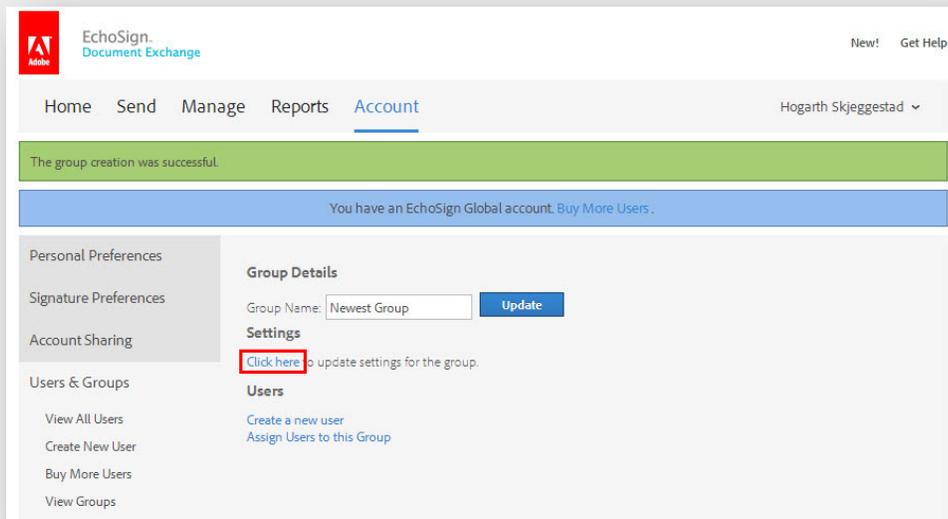
Name	# Users	Admin(s)	Last Modification
Default Group	4	hogarth.skjeggstad@gmail.com	Sep 17 2013
Test	0		Sep 23 2013
Test01	0		Feb 03 2014
New Test	0		Mar 04 2014
New Group	0		Apr 28 2014

Below the table is the 'Add a New Group' section with a 'Group Name' input field and a 'Create' button.

Enter a name for your group and click the **Create** button.

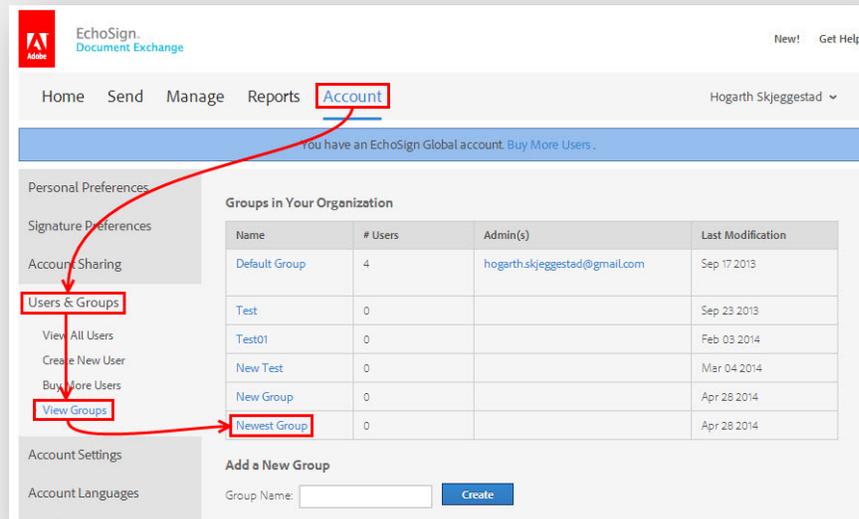
The screenshot shows the 'Add a New Group' form. The 'Group Name' input field contains the text 'Newest Group' and is highlighted with a red box. A red arrow points from the 'Create' button to the 'Group Name' input field. The rest of the page content is the same as in the previous screenshot.

You will be taken to the summary page for the group. A confirmation message will be at the top of the page. Here you can adjust the group specific settings, create users in this group or start assigning existing users to this group.

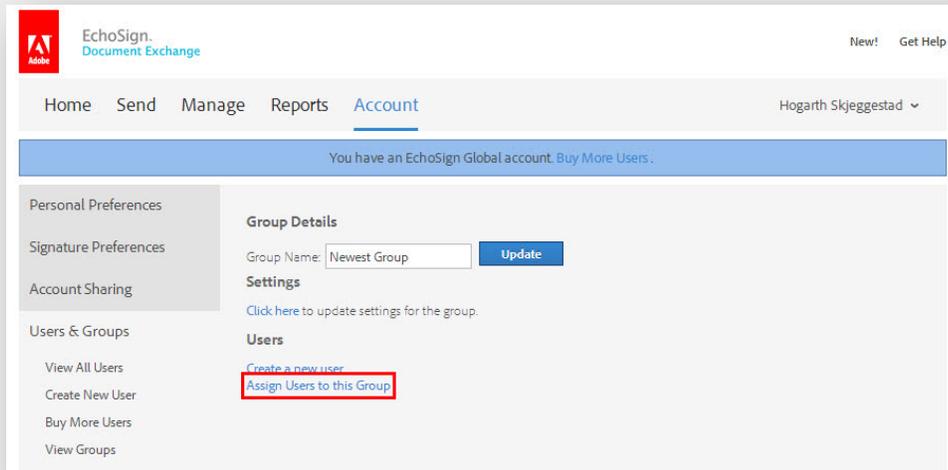


How to Add Users to a Group

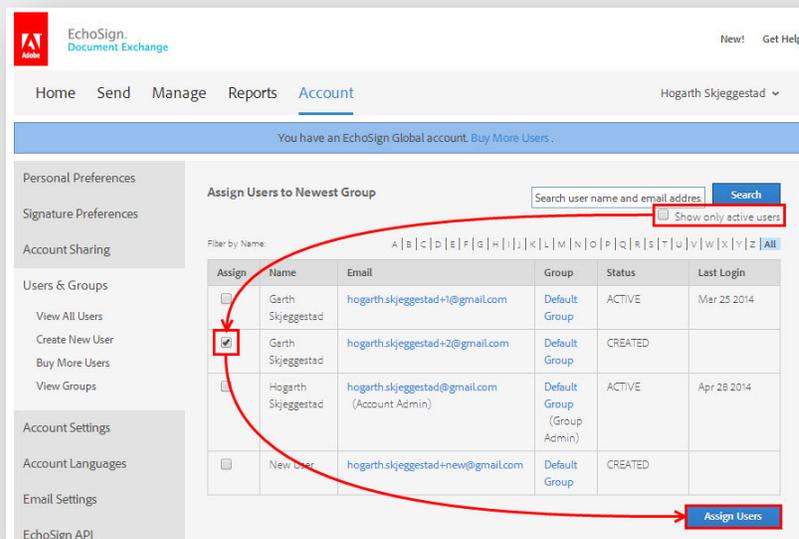
If you're not already on the group's page, go to the **Account** page and click on **Users & Groups**, **View Groups** and click on the name of the group you want to add users to.



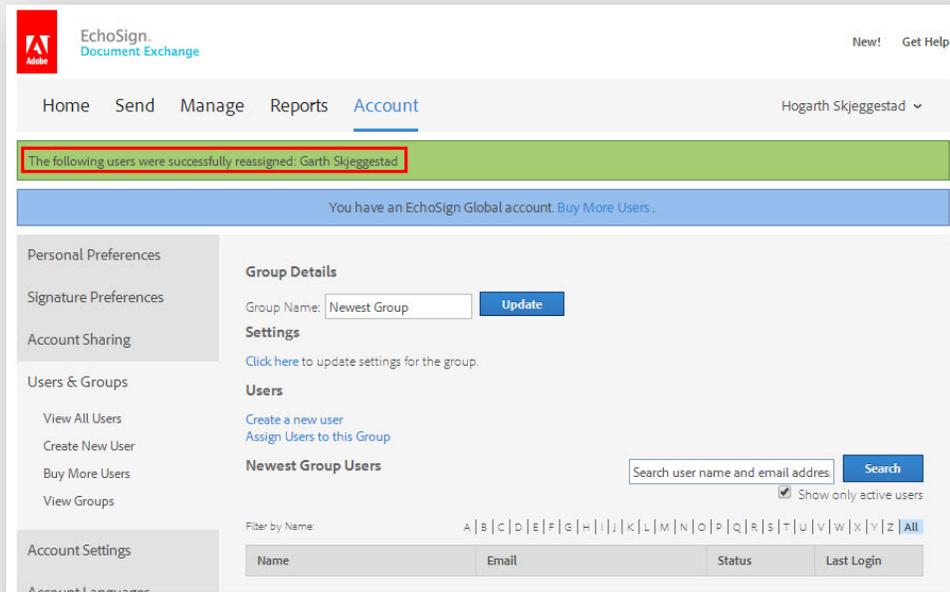
On the group's page, click the **Assign Users to this Group** link.



On the user list page, first uncheck the **Show Only Active Users** option. This will ensure you can see all of the users in your account. Then check **Assign** for the users you want to add and click the **Assign Users** button.



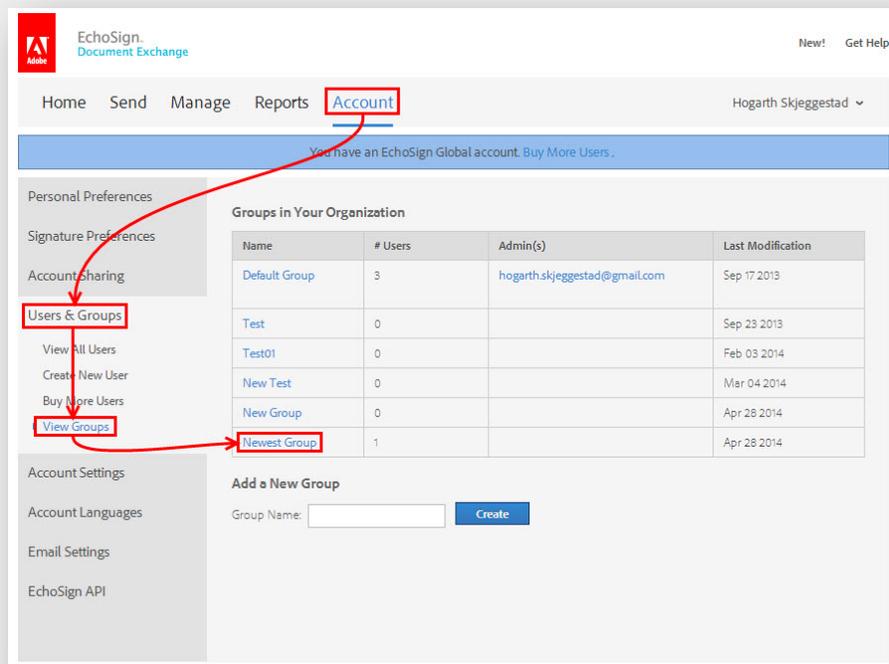
You will then return to the group page and a confirmation page will show the users have been added. These users will also now be listed in the group's user list.



Group Settings

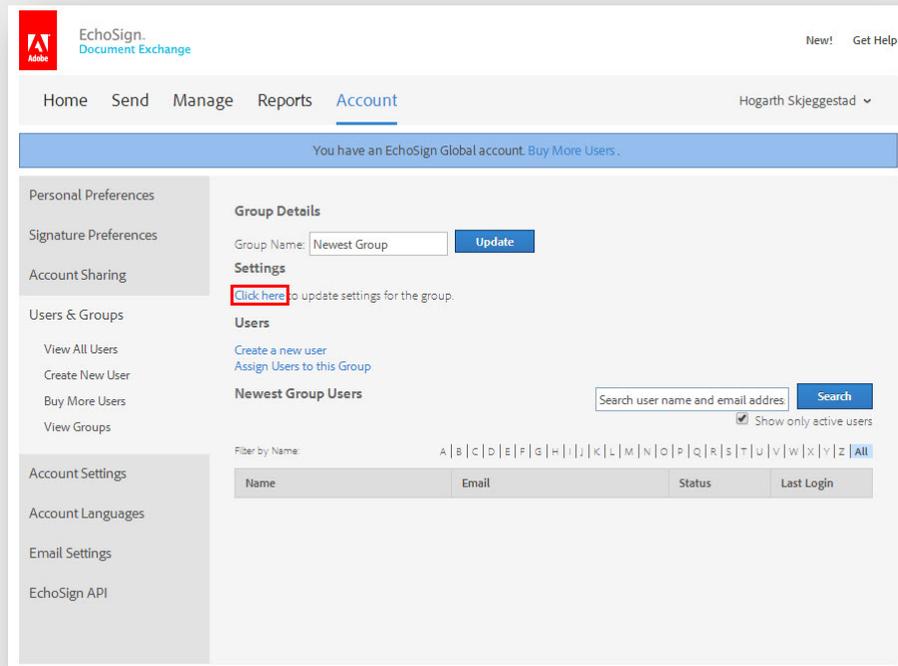
Specific settings at the group level make it so each group can have different settings enabled or disabled, depending on their needs.

To get to the settings for a group, got to the **Account** page, then click on **Users & Groups, View Groups** and the name of the group.





Click on the **Click here** link to get to the settings page.



The following settings can be adjusted per group.

Require signers to provide their job title when eSigning

Signers of all documents sent by the users in this group, will be required to enter their job title. This means all documents will require a Title field.

Require signers to provide their company name with eSigning

Signers of all documents sent by the users in this group, will be required to enter their company name. This means all documents will require a Company field.

Allow signer to return a written signature by fax instead of eSigning

This option allows signers to use the fax back option for their agreement.

Attach a CSV with form data to the sender's signed agreement emails

This setting will attach a CSV file with all of the form data for the signed document.

- Require signers to provide their job title when e-signing
- Require signers to provide their company name when e-signing
- Allow signers to return a written signature by fax instead of e-signing
- Attach a CSV with form data to the sender's signed agreement emails.



Certify copy of the documents for

This feature certifies all PDF documents delivered or downloaded with an Adobe CDS Certificate. A visible indicator on the PDF will show the document has *not* been tampered or altered.

Certify copy of the documents for ?

- All recipients
- Internal recipients
- External recipients
- No one

Attach a PDF copy of the signed document in email sent to

This option allows you to control who will receive a copy of the completed document in the "Signed and Filed" email.

Attach a PDF copy of the signed document in emails sent to

- All recipients
- Internal recipients
- External recipients
- No one

Apply the eSignature stamp to (the bottom) of...

This forces an eSignature stamp on the specified pages. Please note the stamp will cause the document to be scaled down in order to fit the stamp.

Apply the e-signature stamp to (the bottom) of...

- Last page only
- Every page

Attach audit report to completed documents

This option sets whether an audit report is attached to the signed document. This is attached to the end of the document as the last page.



Attach audit report to completed documents

- Never
- For Sender Only
- Always

Merge multiple documents into one document after signing

When sending multiple documents, enabling this setting will merge the documents together. Disabling this will keep them separate, discreet documents.

Merge multiple documents into one document after signing

- Merge documents
- Keep documents separated

Send an extra copy of every signed agreement to these email addresses

The email address you enter into this field will be automatically sent a copy of the "Signed and Field" email, for every transaction sent from a user in this group.

Send an extra copy of every signed agreement to these email addresses

(Enter one or more email addresses, separated by commas)

Twitter Integration

This setting allows or denies users in this group, the ability to integrate with Twitter.

Twitter Integration

- Allow users to send updates to their Twitter account

(No confidential information is disclosed in Tweets - Click [here](#) to see samples.)

Delegation for users in my account

This allows you to control users' ability to delegate or pass on their signing to someone else.



Delegation for users in my account

Can users in my account delegate their signature?

- Yes, can delegate to anyone
- Yes, but only to other users in my account
- No, delegation is not allowed

Delegation for users outside my account

Similar to the previous setting, this allows or denies signers outside of your account to delegate or pass on their ability to sign.

Delegation for users outside my account

- Allow external signers to delegate their signature

Authority to Sign

This is a mass setting that affects all users in this group. This option either allows or denies signing authority for all users in this group. Each users' signing authority can then be adjusted on an individual level.

Authority to Sign ?

Which users in my account are authorized to sign?

- By default anyone can sign, but select users can be blocked from signing.
- By default no one can sign, but select users can be allowed to sign.

Set a time zone to use for agreements created by users in this account

This sets the time zone for documents sent from users in this account.

Set a time zone to use for agreements created by users in this account

(GMT-08:00) Pacific Time (US & Canada) ▼



Agreement Settings

Settings can be changed to affect the default options used when a user sends an agreement. These are used to control how your users use EchoSign. This chapter will be broken into sections related to their effect on a transaction.

All of these settings can be found by going to the **Account** page, then click on **Account Settings** and **Send Settings**.

How users can attach or choose documents

Depending on your situation, you may only want users to send specific documents. This can be done by limiting the methods available for attaching documents.

Attaching Documents

Allow senders to attach documents from their computers

Unchecking this option removes the Upload button and drag and drop file section from the Send page.

Allow senders to attach documents from their document library

Unchecking this option removes the **Document Library** link on the Send page.

Include documents from the EchoSign shared library

Unchecking this option removes the I-9, W-4 and W-9 documents provided by EchoSign.

Allow senders to attach documents from Google Drive

Unchecking this option removes the Google Drive link on the Send page.

Allow senders to attach documents from Dropbox

Unchecking this option removes the Dropbox link from the **More** option, on the Send page.

Allow senders to attach documents from Box.com

Unchecking this option removes the Box.com link from the **More** option, on the Send page.

Allow senders to attach documents from Evernote

Unchecking this option removes the Evernote link from the **More** option, on the Send page.



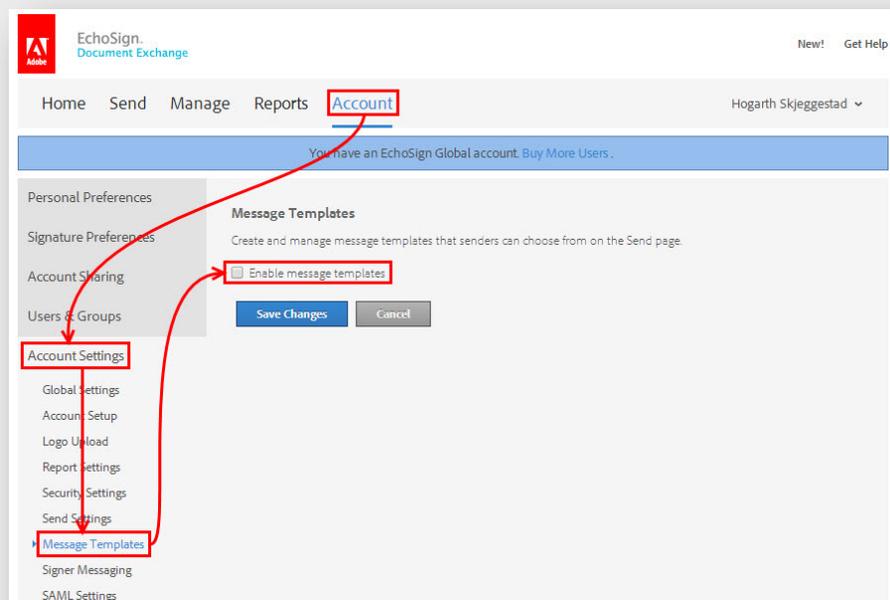
Setting message templates

Enabling Message Templates for your account, allows the user to choose one of the email messages, predefined by you. This can ensure the correct message and information gets to your signers.

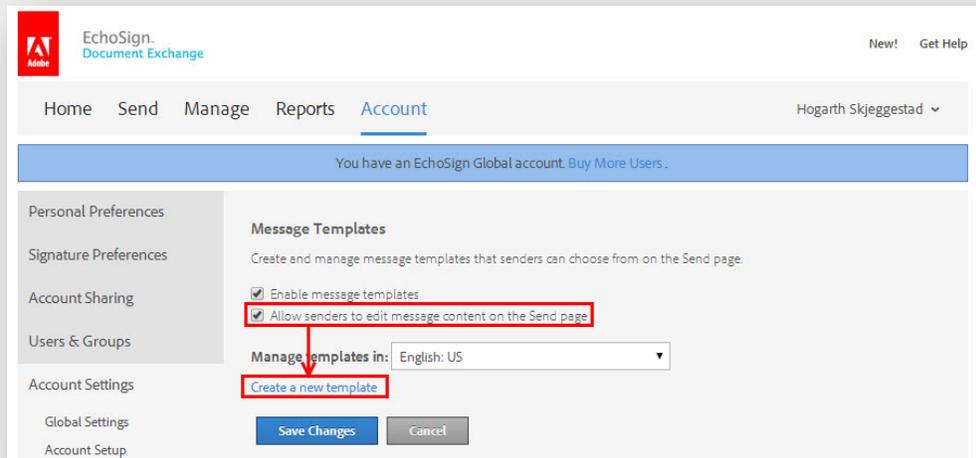
Message Templates

Message Template Settings

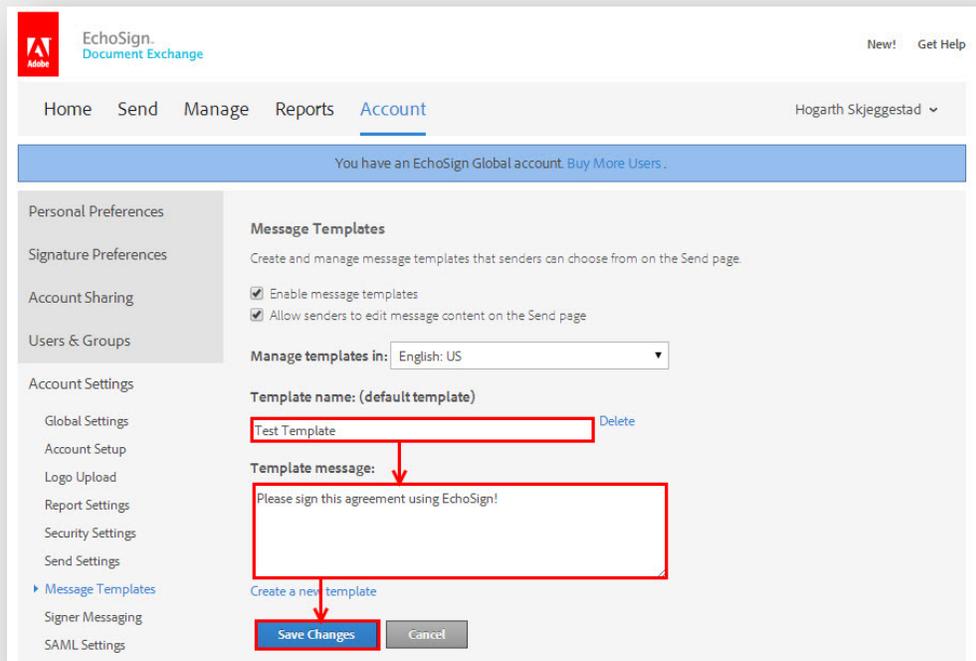
Check the option to enable Message Templates.



Either allow or deny users the ability to change the message content and click **Create a new template**.



The Template name will be the name visible to your users, when they choose a template to use. The Template message will be the message that shows in the email to the signers. Once you're done, click the **Save Changes** button.



Setting default reminders

Reminders are emails sent to the signers of documents. After a specified amount of time, a reminder email is sent to the signer, letting them know the agreement is still waiting for them. These can be set by default for all agreements sent from users in your account.



Reminders

Set a default reminder for agreements created by users in this account

Check the option to set a default reminder.

Reminders

Set a default reminder for agreements created by users in this account

Choose the frequency in which you would like the reminder email sent.

Reminders

Set a default reminder for agreements created by users in this account

Send a reminder every **Day** until completed

Note:

Day
Week

The note entered will show in the reminder email sent to the signers. Once you're done, make sure you click the **Save Changes** button.

Reminders

Set a default reminder for agreements created by users in this account

Send a reminder every **Day** until completed

Note:

Just a friendly reminder, this agreement is still waiting for your signature.

Please note, users will still be able to set a reminder on the Send page. This will effectively double-up the reminder for the agreement and the signers will receive two reminder emails.



Setting a default document expiration

In certain cases you may want to expire or cancel documents that aren't signed after a certain number of days. This can be set at the account level and this expiration will be set for all agreements sent from users in your account. Once an agreement has expired, it cannot be restarted or retrieved and will show up under the Canceled/Declined section of the Manage page.

Document Expiration

Enable document expiration

Check the option to enable document expiration.



This will reveal the options you can set for document expiration.

Allow sender to set or modify expiration settings per document

This opens the expiration option on the Send page, to all users in the account. Additionally, they can then adjust the default expiration set.

Allow modification of expiration settings after document is sent

Checking this option will allow users to adjust, extend or remove an expiration for an agreement after it has been sent.

Limit number of days signers will have to sign documents to:

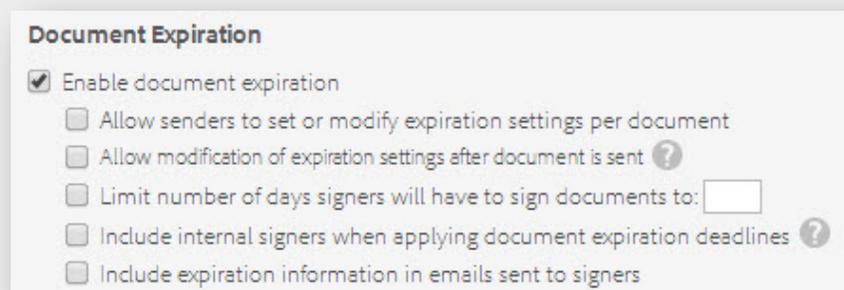
This sets the number of days until the document expires.

Include internal signers when applying document expiration deadlines

If users in your account will be signing or counter-signing agreements, this option will make the expiration apply to them as well as external signers.

Include expiration information in email sent to signers

This adds the expiration date of the transaction in the email sent to the signers.





Library Documents/Templates

If you and your users plan on sending out agreements that are the same document, uploading these documents as templates is ideal. Templates are reusable objects that any user can send, depending on who the template is shared to.

As a best practice, one user should upload and maintain these templates. By creating this document admin, there is no confusion as to what document to send, and the versions of these documents are better controlled.

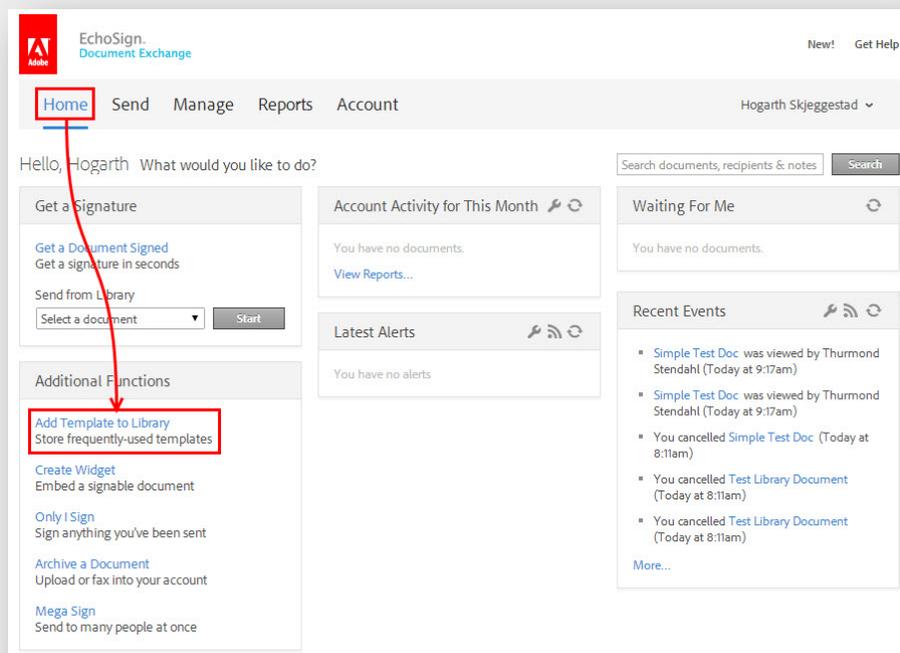
We suggest using a distribution list or group email as the user. This allows you to control who has access to this user and related documents, internally. If one of your members leaves the organization, another person can easily be added to the distribution list and gain access to doc admin.

Library Templates

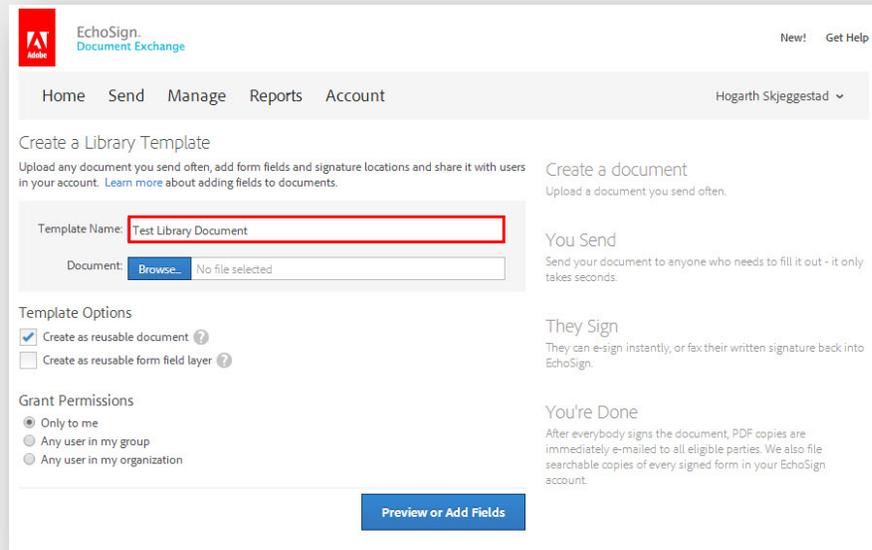
Creating a Reusable Document

A reusable document is just that, a document your users can send over and over. This is especially helpful if you have identical documents that go out to each of your signers.

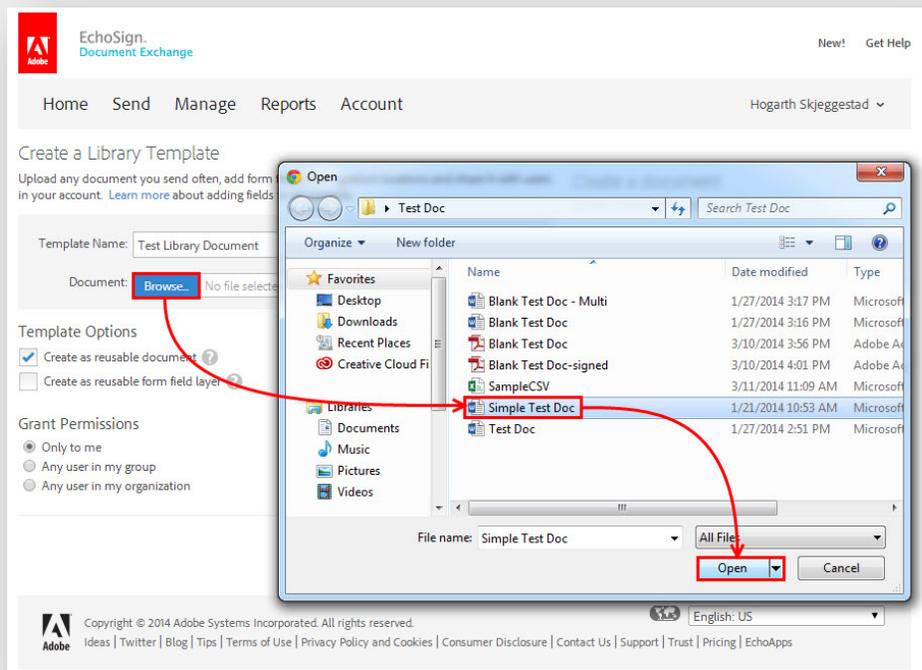
From the Home page, click on the **Add Template to Library** link under Additional Functions.



Enter a name for your template. This can be changed at a later time if necessary.



Click on the **Choose File** button and pick a document from your local system.

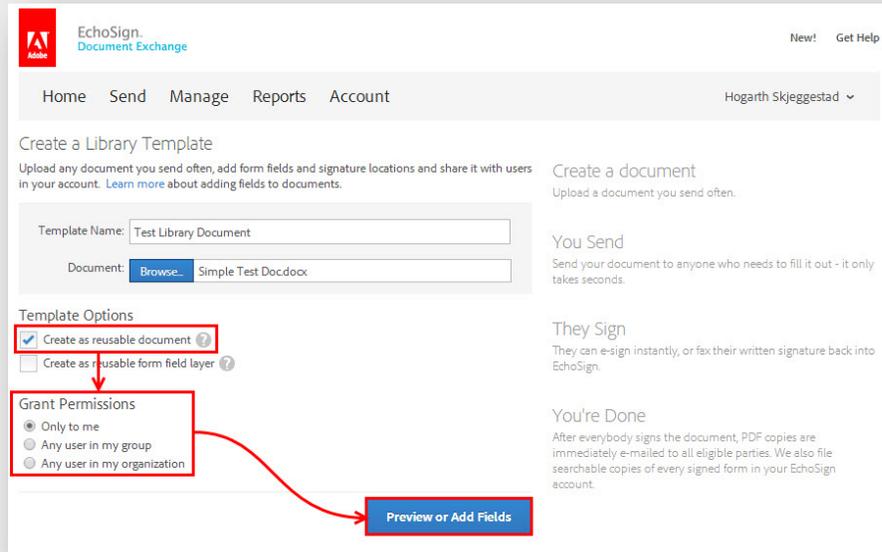


Then check the **Create as reusable document** option and choose who you want to share the document to. Setting the permissions to **Any user in my group** will only share the document to the group you're in.

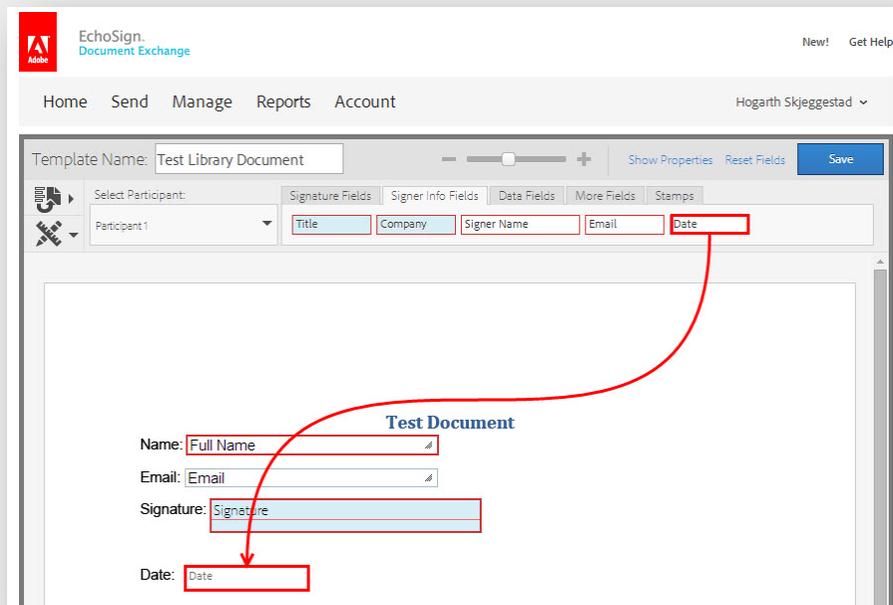


If you're creating the document with the doc admin, make sure to move them into the group you want to have the document available for. Once the documents have been created you can move the user to another group and the documents will stay shared with the initial group.

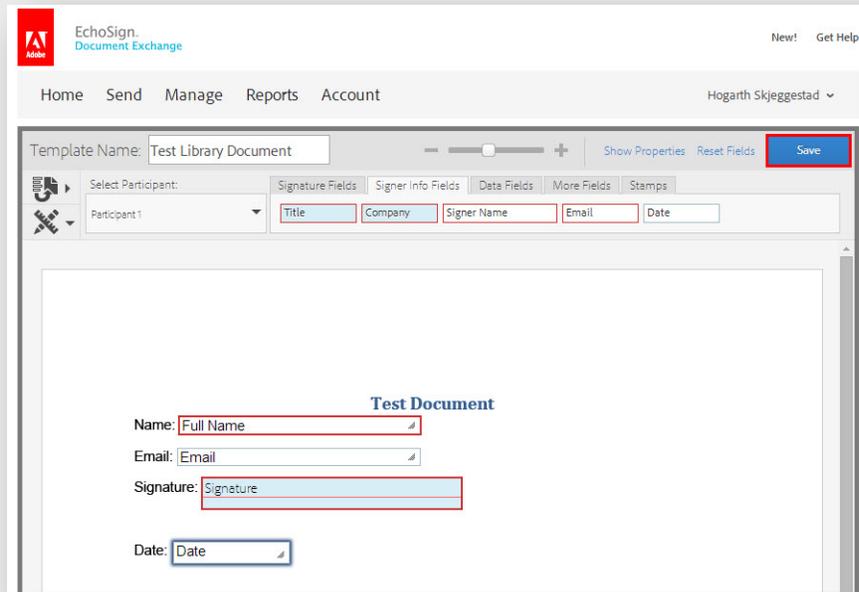
When you're done setting up the initial information, click the **Preview or Add Fields** button.



You will be taken to the drag and drop authoring environment. Here you will place fields for the intended signers and participants and adjust properties for each field.



Once you've placed all of your fields, click the **Save** button.



This template will now show up under the Library Templates section of the Manage page, for all users you shared it to. Only the user that created the library template can edit it, as you can see by the first template listed in the image below.

This template was created by another user and shared to the entire account. I can send the agreement as often as I'd like, but the creator is the only one that has rights to edit it.

Please note, when a user sends a library template, they will have the opportunity to move or alter fields if they have the "Preview, position signatures or add form fields" option checked on the Send page.

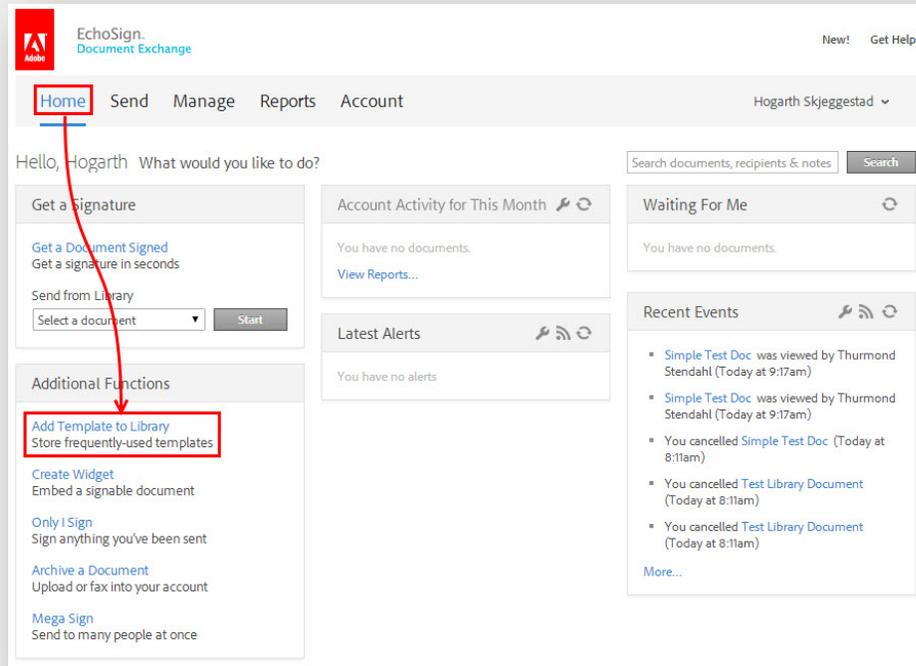
Name >	Company >	Document Title >	Date >
▼ Waiting For Me to Sign (0)			
> Out for Signature (2)			
> Signed (4)			
▼ Archived (0)			Upload Agreements
▼ Library Templates (5)			
Document Template	send edit	Test Library Document	04/28/14
Document Template	send	Other Users Test Template	03/25/14
<small>Shared By Garth Skjeggstad @ EchoSign</small>			
Document Template	send edit	Test Library Document	03/04/14
Form Field Template	edit	Test Form Field Layer	01/22/14
Document Template	send edit	Test Library Document	01/22/14



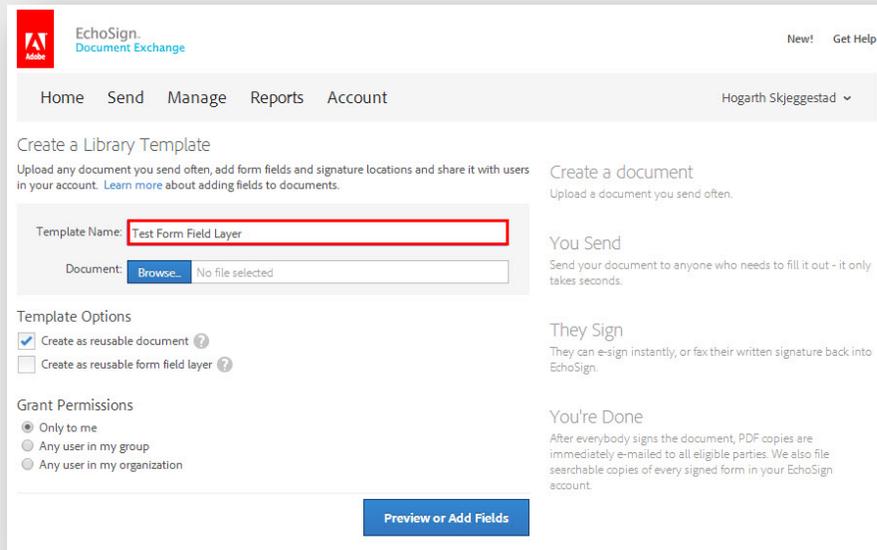
Creating a Reusable Form Field Layer

Form Field Layers are overlays of fields you can apply to any document you send. For example, one of your documents is revised and the content has changed, but the field placement has not. Using a Form Field Layer, you can place all of those fields on the new document without having to place them individually.

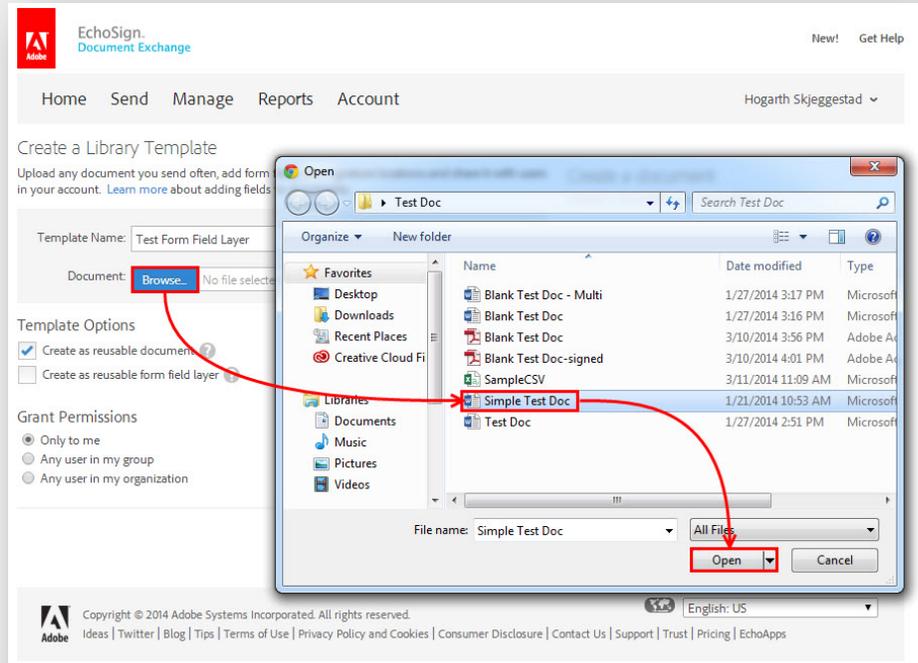
To create a Form Field Layer, click on the **Add Template to Library** link under the Additional Functions on the Home page.



Enter the name for your Form Field Layer. You can change this in the future if needed.



Click the **Choose File** button and pick a document from your local system. The content of the document you choose will not be included in the Form Field Layer. This is just to show where the fields should go.

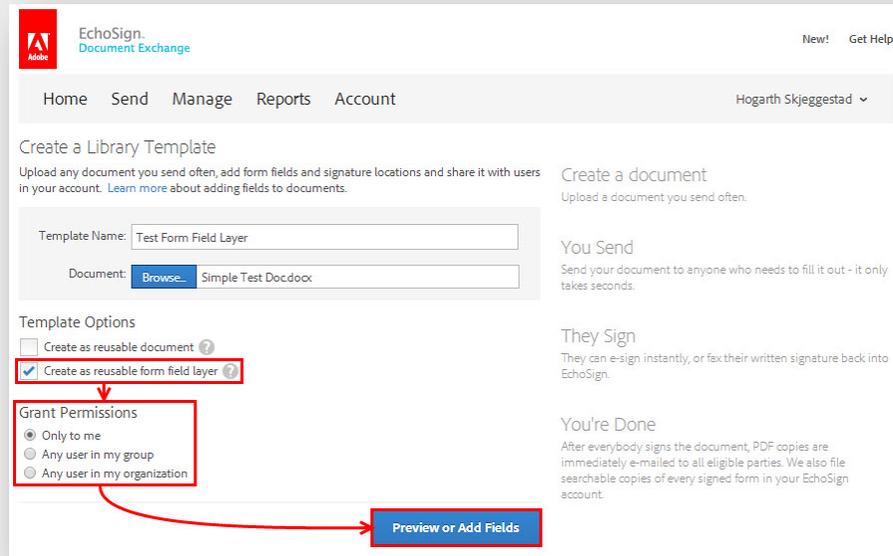


Check the **Create as reusable form field layer** option and choose who you want to share the layer to. Setting the permissions to **Any user in my group** will only share the layer to the group you're in.

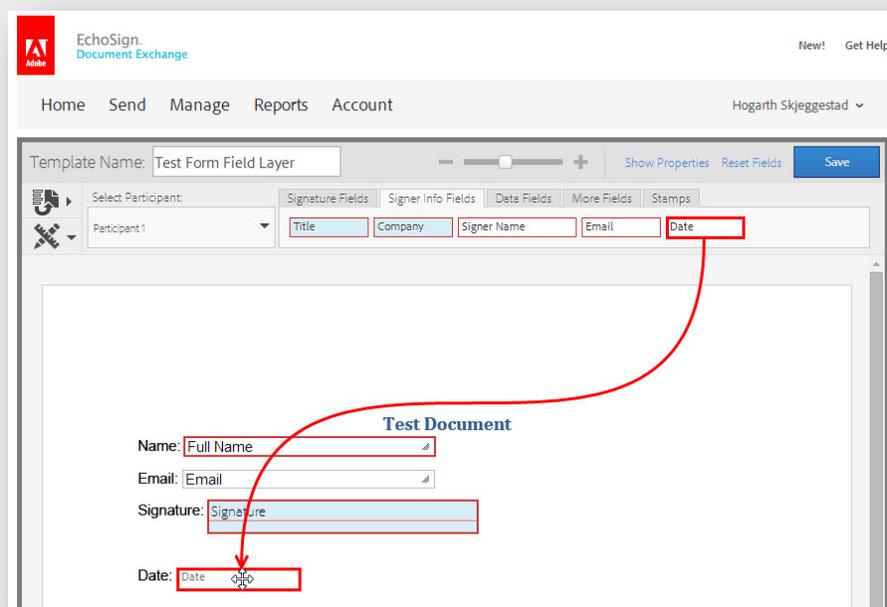


If you're creating the layer with the doc admin, make sure to move them into the group you want to have the layer available for. Once the layers have been created you can move the user to another group and the layers will stay shared with the initial group.

When you're done setting up the initial information, click the **Preview or Add Fields** button.

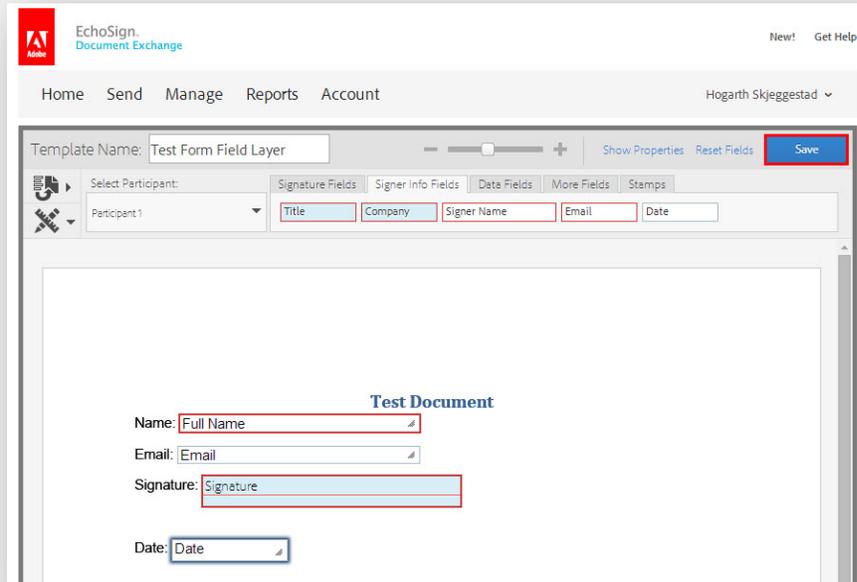


You will be taken to the drag and drop authoring environment. Here you will place fields for the intended signers and participants and adjust properties for each field.





Once you've placed all of your fields, click the **Save** button.



This layer will now show up under the Library Templates section of the Manage page, for all users you shared it to. Only the user that created the layer can edit it.

Please note, when a user sends a Form Field Layer, they will have the opportunity to move or alter fields if they have the "Preview, position signatures or add form fields" option checked on the Send page.

Changing Permissions

If you need to change the permissions on either a document or layer template, you can do so at any time. Changing the permissions for both documents and layers is the same process.

On the Manage page, click on the **edit** link for the template you want to change permissions for.



EchoSign. Document Exchange

Home Send **Manage** Reports Account

Filter by Name or Company Filter by Document Status Filter by Document Owner Search documents, recipients & notes

Name	Company	Document Title	Date
Waiting For Me to Sign (0)			
Out for Signature (2)			
Signed (4)			
Archived (0) Upload Agreements			
Library Templates (6)			
Form Field Template	edit	Test Form Field Layer	04/28/14
Document Template	send edit	Test Library Document	04/28/14
Document Template	send	Other Users Test Template	03/25/14
<small>Shared By Garth Skjeggstad @ EchoSign</small>			
Document Template	send edit	Test Library Document	03/04/14
Form Field Template	edit	Test Form Field Layer	01/22/14
Document Template	send edit	Test Library Document	01/22/14

Print Enlarge PDF Cancel

Simple Test Doc
From: Hogarth Skjeggstad (EchoSign)
To: Thurmond Stendahl (Thurmond Stendahl)
Date: 04/28/2014 9:16 AM
Status: Out for E-signature

View Share Remind History Notes

Click on the **Show Properties** link at the top of the page.

EchoSign. Document Exchange

Home Send Manage Reports Account

Template Name: Test Library Document [Show Properties](#) Reset Fields Save

Select Participant: Participant 1 Signature Fields Signer Info Fields Data Fields More Fields Stamps

Participant 1 Signature Initials Signature Block

Test Document

Name: Full Name

Email: Email

Signature: Signature

Date: Date

This will reveal the permissions options for the template. Change the permission to the desired level and click the **Save** button.



EchoSign.
Document Exchange

New! Get Help

Home Send Manage Reports Account Hogarth Skjeggstad

Template Name: Test Library Document Hide Properties Reset Fields Save

Set permission to send this document for signature:
 Only to me Any user in my group Any user in my organization

Select Participant: Participant1 Signature Fields Signer Info Fields Data Fields More Fields Stamps

Signature Initials Signature Block

Test Document

Name: Full Name

Email: Email

Signature: Signature

Date: Date

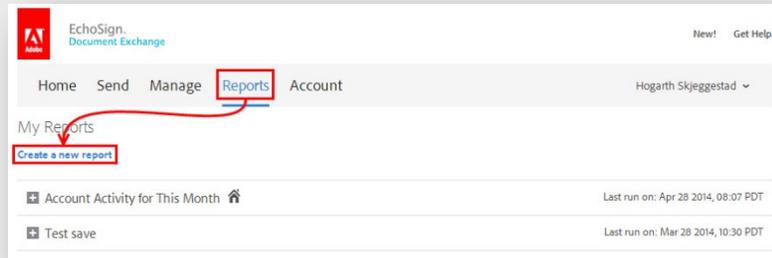


Reports

The report feature lets you check on how your account is using EchoSign. Build your own reports and gain complete visibility into your document signing process, while seeing how individual groups or users are doing.

Creating a new report

To create a new report, go to the **Report** page and click on the **Create a new report** link.



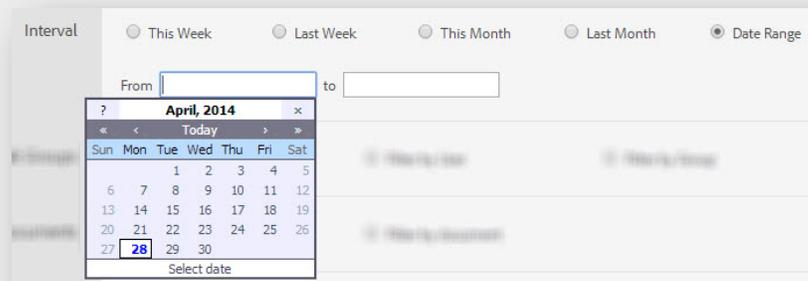
This will take you to the report parameters page, where you set what data your report will include.

Report Parameters

When setting up a report, multiple parameters can be set to cater the results to the information you're looking for. The below options are the various parameters.

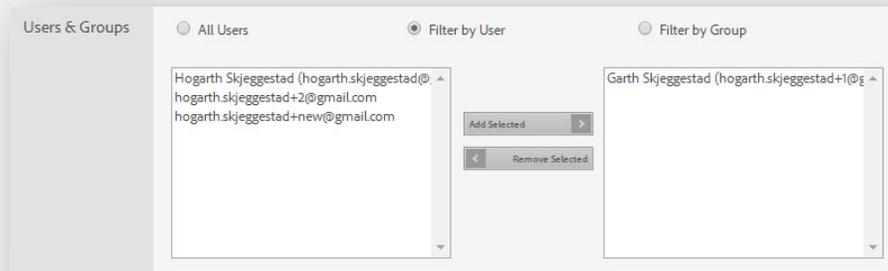
Interval

The interval is the time frame you want the report to encompass. This can be one of the four predetermined time frames (this week, last week, this month, last month) or enter a custom date range.



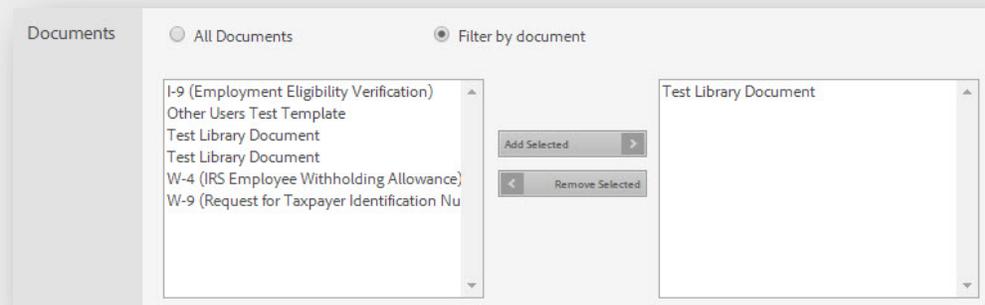
Users & Groups

This parameter lets you run the report on specific users or groups. One or more can be chosen for either, or you can run the report against all users in the account.



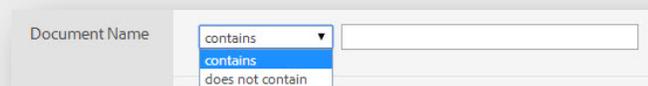
Documents

Specific documents can be chosen to include in the report with this option. The documents listed in this field are the library documents used throughout the account. Individual, one-off documents will not be listed here.



Document Name

This parameter is used to include documents that have titles of the provided string. You can choose to include or not include the string entered.



Mega Sign

Checking this option will include Mega Sign agreements in the resulting report.





Performance Goals

This is where you can set your own performance goals. This will affect the gauges that are displayed on the report.

Performance Goals	Set your performance goals by specifying thresholds for gauge colors:					
% Completed:	Green: >	<input type="text" value="50"/>	%	Yellow: >	<input type="text" value="25"/>	%
Time to Complete:	Green: <	<input type="text" value="60"/>	Min.	Yellow: <	<input type="text" value="90"/>	Min.

Benchmark

By default, the benchmark parameter is disabled for reports. Click the **report settings** link to enable it.

Benchmarking provides an expanded method for keeping track of agreement progress and signing rates. More information can be found here:

<https://www.echosign.adobe.com/en/how-it-works/features-benefits/analytics-features.html>

Benchmark	Benchmarking is not enabled for your account. You can opt-in and enable it on the report settings page.
-----------	-------------------------------------------------------------------------------------------------------------------------

Graph Agreements By

Each checked option will provide a different type of graph on the report.

Graph Agreements By	<input checked="" type="checkbox"/> Date	<input checked="" type="checkbox"/> Sender	<input checked="" type="checkbox"/> Group	<input checked="" type="checkbox"/> Form	<input checked="" type="checkbox"/> Signature Type
---------------------	------------------------------------------	--------------------------------------------	-------------------------------------------	------------------------------------------	----------------------------------------------------

Et Cetera

The parameters in this section are for altering the graphics on the resulting report. Changing these from the defaults can speed up the report process.

Et Cetera	Animation: <input checked="" type="radio"/> Yes <input type="radio"/> No	Color Shading: <input checked="" type="radio"/> Yes <input type="radio"/> No	Bar Charts: <input checked="" type="radio"/> 3D <input type="radio"/> 2D
-----------	--------------------------------------------------------------------------	------------------------------------------------------------------------------	--------------------------------------------------------------------------

Report results

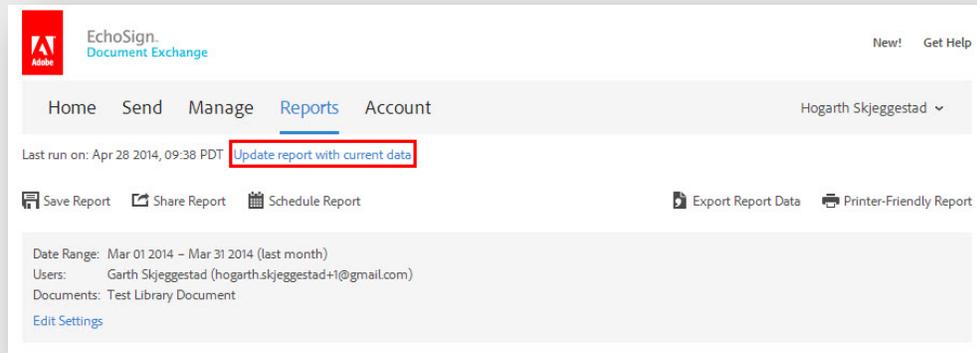
Once you click the **Run Report** button, the report will be generated based on your parameters. There are multiple actions you can take with your report.

Copyright ©2014 Adobe Systems Incorporated. All Rights Reserved.



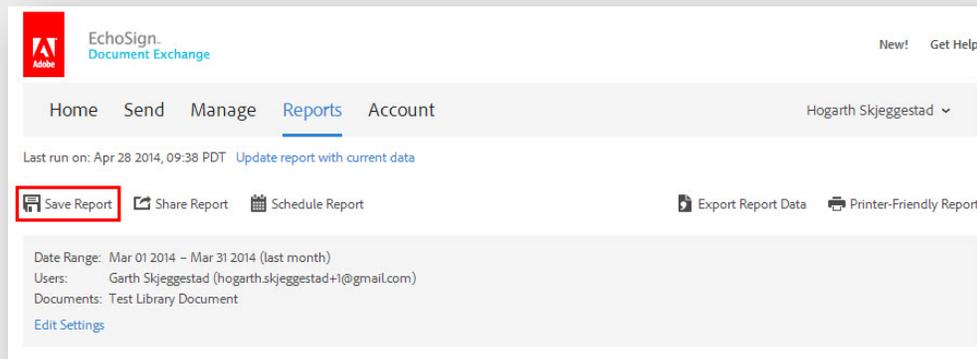
Update Report with Current Data

Clicking this link is similar to refreshing the page. The new report will include recent transactions and activity.



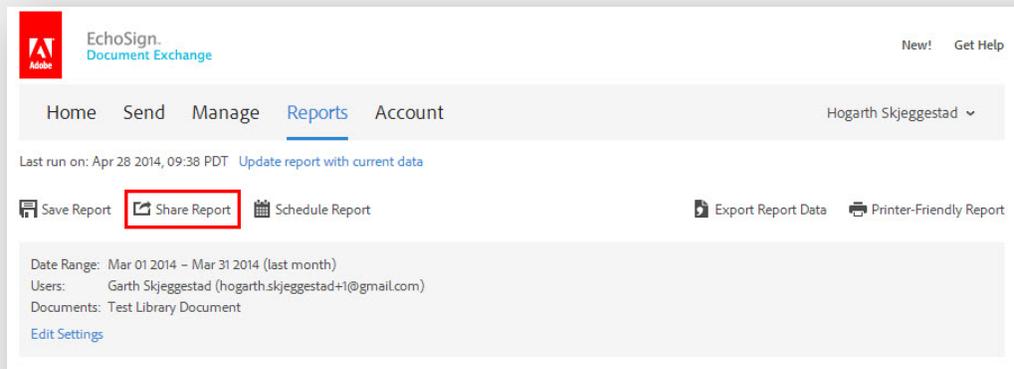
Save Report

Saving the report allows you to run this report again in the future.



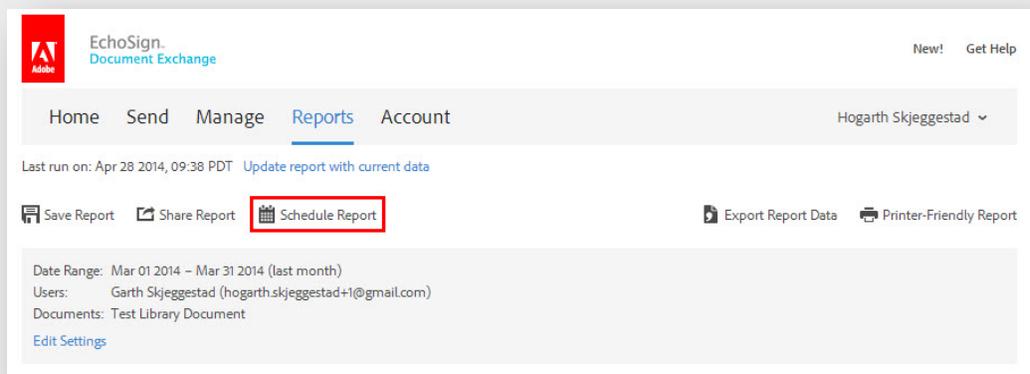
Share Report

Sharing allows you to send the report results to someone else. You just need to enter their email address and a message.



Schedule Report

Setting a schedule for this report will run it with the same parameters at the frequency you define.



Export Report Data

Clicking this link will prompt you to open or save a .CSV file. CSV files can be opened in Excel and all transaction information for the agreements in the report, will be categorized in the various columns.



The screenshot shows the EchoSign Document Exchange interface. At the top left is the Adobe logo. The main header includes the text "EchoSign. Document Exchange" and "New! Get Help". Below this is a navigation bar with "Home", "Send", "Manage", "Reports" (underlined), and "Account". The user name "Hogarth Skjeggstad" is displayed on the right. A status bar indicates "Last run on: Apr 28 2014, 09:38 PDT" with a link to "Update report with current data". Below the navigation bar are three buttons: "Save Report", "Share Report", and "Schedule Report". To the right, there are two buttons: "Export Report Data" (highlighted with a red box) and "Printer-Friendly Report". A summary box contains the following information: "Date Range: Mar 01 2014 - Mar 31 2014 (last month)", "Users: Garth Skjeggstad (hogarth.skjeggstad+1@gmail.com)", and "Documents: Test Library Document". A link for "Edit Settings" is at the bottom left of the summary box.

Printer-Friendly Version

Clicking this link will open a printer-friendly version of the report.

This screenshot is identical to the one above, showing the EchoSign Document Exchange interface. The only difference is that the "Printer-Friendly Report" button is now highlighted with a red box, while the "Export Report Data" button is no longer highlighted.